**Steps in Establishing a Small Business Preference Program**

**1. Adopt small business procedures**

Chapter 3, section 3.4 of the Judicial Branch Contracting Manual (JBCM) requires each judicial branch entity (JBE) to adopt small business preference procedures applicable to the competitive procurement of IT goods and services. A sample set of small business procedures is provided on the JBCL Page (*www.courts.ca.gov/18759.htm*). Use of the sample small business procedures is optional; the JBE may develop its own procedures. If the JBE uses the sample small business procedures, it should (i) delete all comments in the document, (ii) replace references to “the JBE” with the JBE’s proper name, and (iii) make any customizations desired by the JBE.

The small business procedures may be included in the JBE’s Local Contracting Manual.

**2. Adopt related forms**

As a practical matter, the JBE will need at least two forms in order to administer its small business preference program.

Sample forms for use with the small business preference program are provided on the JBCL Page. Use of the sample forms is optional; the JBE may develop its own forms. The sample forms are designed to work with the sample small business procedures referenced in Section 1 above. If the JBE uses the sample forms, it should (i) delete all comments in the forms, (ii) replace references to “the JBE” with the JBE’s proper name, and (iii) make any customizations desired by the JBE. If changes are made to the sample small business procedures, corresponding changes will need to be made to the forms.

The sample forms are:

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| **Form** | **How used** |
| Small Business Declaration | Included with the IT goods or services solicitation document. An entity that wishes to claim the small business preference must complete and return this form to the JBE.  |
| Post-Contract Report  | Completed by the vendor once the contract is completed, if a small business preference was received. |

**3. Include small business preference language in solicitation documents**

The JBE should include language in its IT goods and services solicitation documents that explains how the small business preference works. Sample explanatory language is provided for use in lowest responsible bidder solicitations (such as IFBs) and in highest scored bid solicitations (such as RFPs). The sample IT goods and services RFP posted on the JBCL Page includes the sample explanatory language for highest scored bid solicitations as well as a customized small business declaration attachment. Use of this explanatory language or this solicitation document is optional; the JBE may develop its own explanatory language and solicitation documents.

If changes are made to the sample small business procedures, corresponding changes will need to be made to the sample explanatory language and solicitation document (if used).